



DTS ITSM Service Request Management System External Customer Overview

DTS ITSM Service Request Management System Introduction

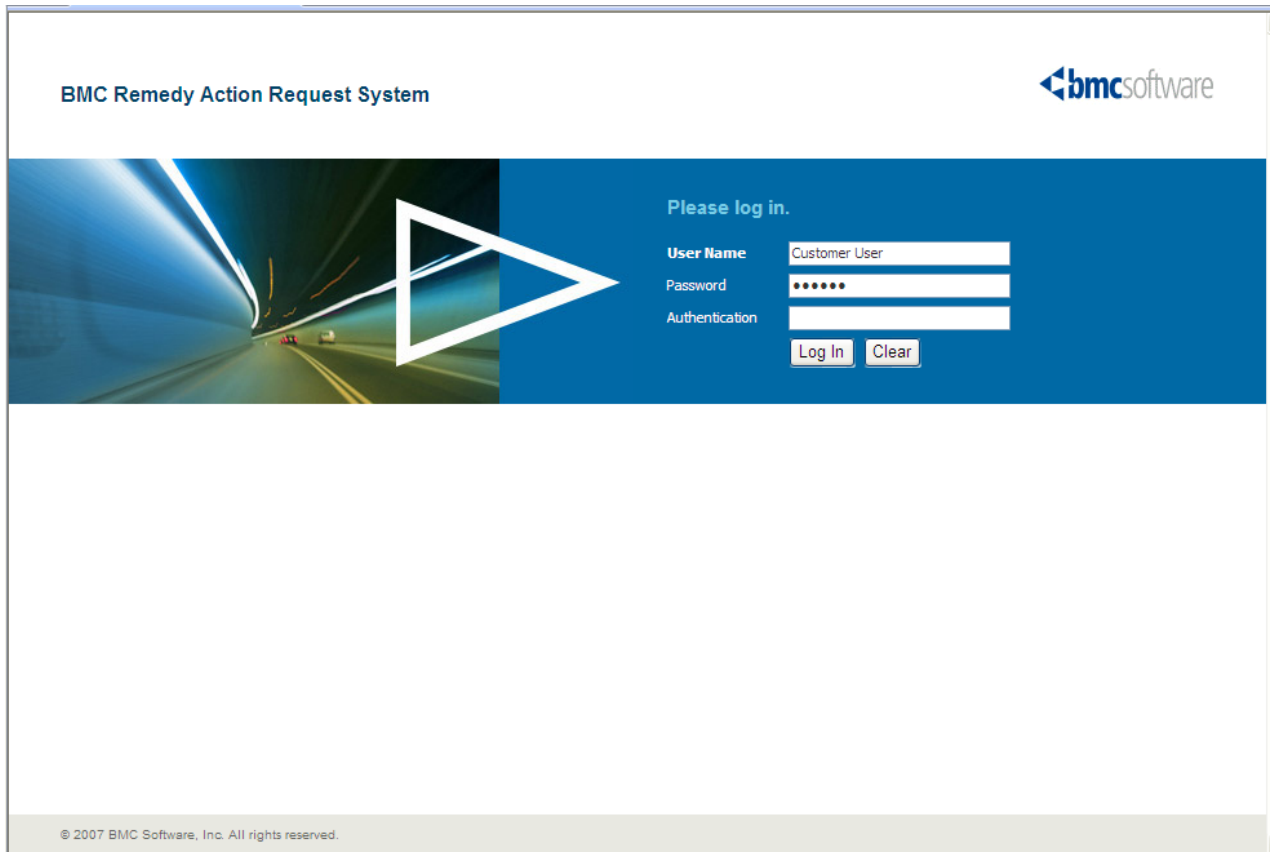
- Overview of how Service Request Management (SRM) works
- High-level descriptions & specific design definitions
- Generic descriptions of how users access and use Service Request Management (SRM)
- Quick demonstration of the SRM Console
 - Logging in
 - Submitting a request
 - Viewing a request
 - Updating a request
 - Logging Off
- The implementation of the DTS ITSM Service Request Management System is Not designed to replace the Customer Support System (CSS) or the DTS Service Catalog.
- It is designed to replace the existing Remedy 5 web interface, Rapid Change application, and the former SubmitCR process.

What is SRM?

- Service Request Management (SRM) is the single point of entry in Remedy for users to open, view and manage their requests.
- SRM is an Actionable Service Catalog
 - Allows requester to see all services available
 - Allows self-service by requester
 - Provides feedback/tracking of requests
- Easy interaction between the Requester and Service Providers:
 - Web interface
 - Favorites
 - Search capable
- It allows users to perform the following actions:
 - Look at services
 - Place orders
 - View orders
 - Reorder services
 - Create Requests
 - Search for Requests
 - View status on Requests
 - Modify or update Requests
 - Monitor recurring Requests
 - The ability to Close and Re-Open requests
 - Open Requests On Behalf Of Others
 - Run Reports

Logging In

- To obtain authorization to use the system, please contact the Department of Technology Services, Service Desk at (916) 464-4311 or email your request to: DTSHELP@DTS.CA.GOV
- You can access the DTS ITSM Service Request Management System at: <HTTPS://ITSM.DTS.CA.GOV> or the Department of Technology Services Homepage at: <WWW.DTS.CA.GOV> selecting 24/7 Service Desk and “ITSM Service Request Management System”. From there you can either sign in to the system or view the application procedures.
- It is recommended that your Internet browser be IE 7 or higher, Mozilla 1.7.3, or Firefox 2.0. Pop-ups should also be allowed for the site.
- To log into this system, enter your Email Address and Password (**password is Case sensitive**), leave the Authentication field blank, and hit Enter or click on Log in button.



BMC Remedy Action Request System

bmcsoftware

Please log in.

User Name

Password

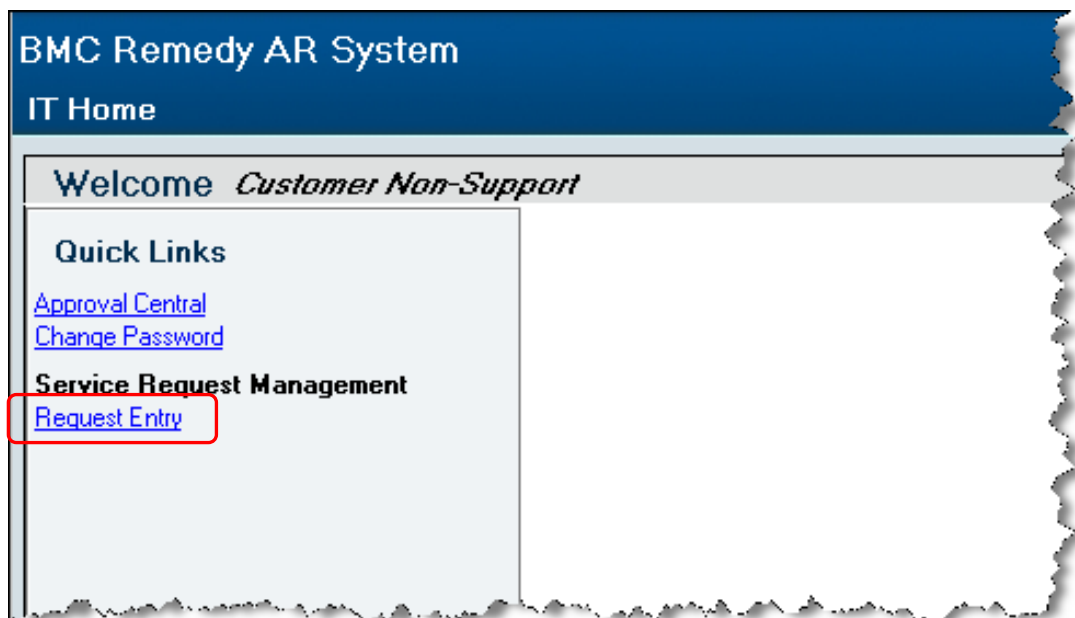
Authentication

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- IT Home Page

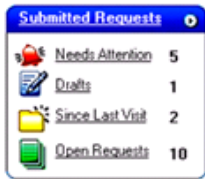

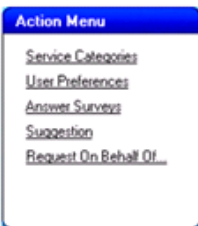










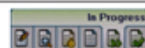
After logging in, the IT Home Page will appear. You will have three options to choose from in the Quick Links selection.

- Approval Central – this link will allow you to approve requests
(this option will be available at a later date)
- Change Password – allows you to change your login password
(If you are an **Internal DTS employee**, do not use this link to change your password. Please use your DTS Network password to log in.)
- Request Entry – launches the Service Categories Console. This console provides a web interface to submit, view, search, update, cancel, re-open, and submit requests on behalf of others. You can also view broadcasts sent by the Department of Technology Services.



Service Categories Console Functions

The Service Categories Console functions are located on the left side of the page called the Navigation Pane. The following tables will describe the functional areas.

ICON	FUNCTION	ACTION
	Submitted Requests	Submitted Requests Section
	Needs Attention	Displays service requests that have been updated or require your attention.
	Drafts	Displays service requests that have been saved as a Draft to be submitted at a later date.
	Since Last Visit	Displays service requests that have been Closed since your last visit.
	Open Request	Displays all Open service requests.
	Quick Picks	Links to Service Requests that are selected most often.
	Report an Incident	Opens a service request to report an incident.
	Password Reset	Opens a service request for a password reset.
	Action Menu	Allows you to select other important functions
	Service Categories	List of all services by category.
	User Preferences	Configure settings of the Request Entry Console.
	Answer Survey	Provide feedback on the quality of service on a particular request.
	Suggestion	Enter suggestions to improve your experience with DTS.
	Request On Behalf Of	Allows you to create requests on behalf of other users.
	View Broadcasts New Broadcasts	Displays important messages about work or outages that might affect your organization.
	Shopping Cart	Allows you to select multiple categories and put them in the shopping cart before filling them out individually.
	Refresh	Refresh the data in the tables.
	Logout	Log out of the Remedy 7 web tool.
	Help	Access the help function on how to use the application.
	Search	The search menu and magnifying glass allows you to search for a specific service.
	Home Service Categories	The Home and Service Categories Links take you back to the Service Categories Console.
	Recent Pages	<p>This will take you back to the IT Home Page or bring up other recent pages.</p> <p>The look will vary depending on which version of IE you are running.</p> <p>Select the drop down arrow next to the back and forward buttons located in the upper left corner of your internet session and select the Home Page (Search).</p>
	Back Link	<p>The Link takes you to the previous view much like the internet browser's back button.</p> <p>The Link maintains the history of the last three views.</p> <p>The Link is disabled when there is no view history, submitting a request, or when you have reached the beginning of the view history.</p>
	Forward Link	<p>The Link moves the user ahead in the Back history.</p> <p>The Link is disabled when you reach the end of the view history.</p>
	Workflow Bar	Displays the status of the selected service request.

Submitting a request

- After clicking on the Request Entry link on the Home Page, the Service Categories page will appear.
- We recommend that you use the new “Request On Behalf Of” feature located in the Navigation Pane when submitting requests. This feature will allow unrestricted view of all requests within an agency or department.

The screenshot displays the BMC Service Request Management web application. The top navigation bar includes the BMC logo, the title "BMC Service Request Management", and user information "Welcome Customer Non-Support". It also features links for "Cart", "Refresh", "Logout", and "Help". Below the navigation bar is a search bar with a dropdown menu set to "All" and a search icon. A "View Broadcast" link is also present.

The main content area is titled "Service Categories" and displays four service categories:

- Network Support Services**: Provides non-billable network service requests (formerly Rapid Change). Includes a link to "List Related Services »".
- Employee Services**: Describes services that provide for building maintenance, space planning, phones and accessories, and voice mail. Includes links to "List Related Services »" and "Browse Sub-Categories »".
- IT Support Services**: Includes services such as troubleshooting technical issues, system/application/server user id and account issues, and password resets (non-network related). Includes links to "List Related Services »" and "Browse Sub-Categories »".
- DTS Services**: Contains links to the DTS Service Catalog and Customer Service System (CSS). Includes a link to "List Related Services »".

The left sidebar contains three sections:

- Submitted Requests**: Shows counts for "Needs Attention" (4), "Drafts" (0), "Since Last Visit" (0), and "Open Requests" (0).
- Quick Picks**: Includes links for "Report an Incident" and "Password Reset".
- Action Menu**: Includes links for "Service Categories", "User Preferences", "Answer Surveys", "Suspension", and "Request On Behalf Of...". The "Request On Behalf Of..." link is highlighted with a red rectangle.

The bottom right corner of the page indicates it is "Powered by BMC Software".

- The following popup will appear.

On Behalf Of Selection

Search Criteria

Organization Information

Company
Organization
Department

Location Information

Region
Site Group
Site

Person Information

First Name
Last Name
Full Name
generic

Search
Clear

Select a user to act "On Behalf Of"

1 entries returned - 1 entries matched

Remedy Login ID	Full Name	Company	Department	Organization	Region	Site Group	Site
GenAct_Employment...	Generic Employme...	DTS ITSM Ser...	- None -	Employment D...	Sacramento/Si...	Sacramento	Unable To

Select
Close

- Enter the word “**generic**” in the Full Name field.
- Click on the Search button.
- Ensure the “GenAct_**(your agency / department name)**” record is displayed and highlighted in the lower window.
- Click on the Select button to access the generic I.D view.
- This will return you to the Service Categories console.

- The “Request On Behalf Of” will now show as “On Behalf Of Self.” In the upper right corner you will see a “Requesting On Behalf Of Generic” message.

The screenshot displays the BMC Service Request Management web application. The top navigation bar includes the BMC logo and the text "BMC Service Request Management". On the right side of the header, a welcome message "Welcome Customer Non-Support" is visible, along with a red-bordered box containing the text "(Requesting On Behalf Of Generic Employment Development)". Below the header, a search bar is present with the text "Search All for".

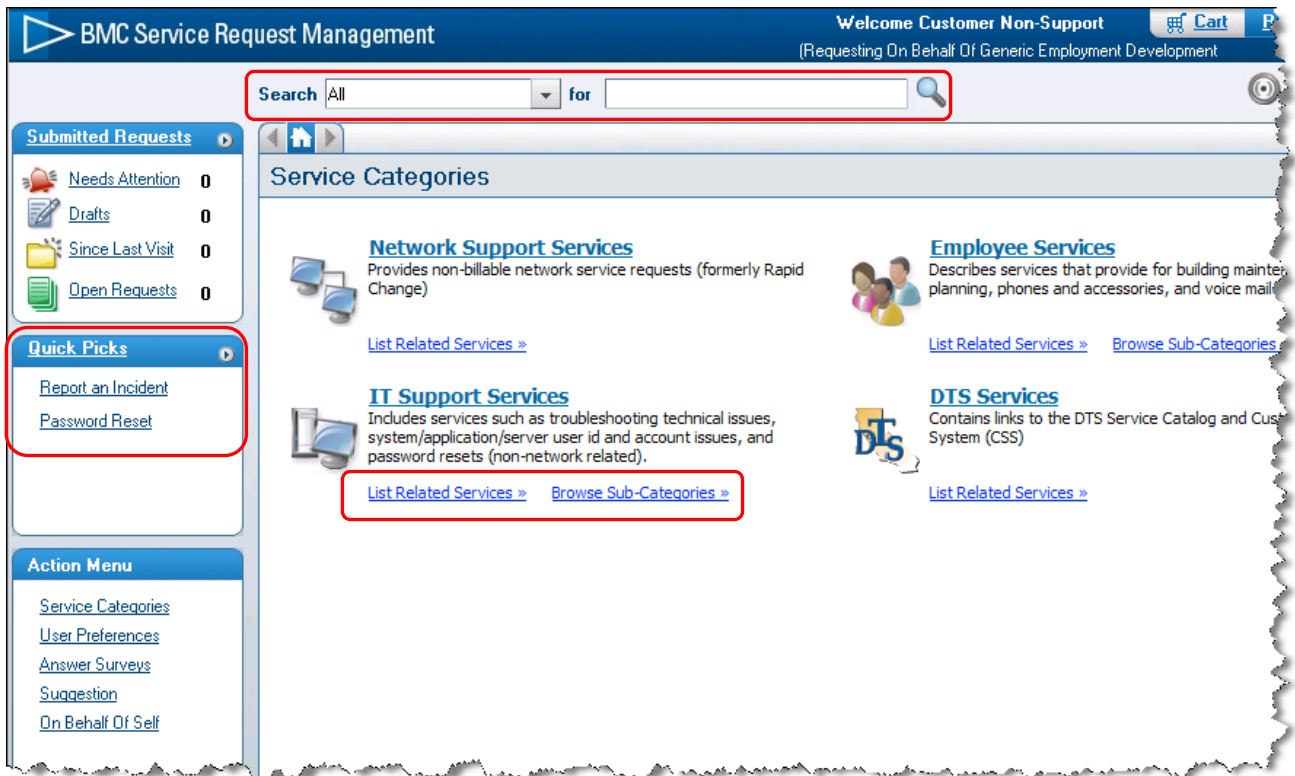
The left sidebar contains several sections:

- Submitted Requests:** A list of request statuses with counts: Needs Attention (0), Drafts (0), Since Last Visit (0), and Open Requests (0).
- Quick Picks:** A list of quick actions: Report an Incident, Password Reset, and a red-bordered box containing "On Behalf Of Self".
- Action Menu:** A list of actions: Service Categories, User Preferences, Answer Surveys, Suggestion, and a red-bordered box containing "On Behalf Of Self".

The main content area is titled "Service Categories" and features four service categories:

- Network Support Services:** Provides non-billable network service requests (formerly Rapid Change). Includes a link to "List Related Services »".
- Employee Services:** Describes services that provide for building maintenance, planning, phones and accessories, and voice mail. Includes links to "List Related Services »" and "Browse Sub-Categories »".
- IT Support Services:** Includes services such as troubleshooting technical issues, system/application/server user id and account issues, and password resets (non-network related). Includes links to "List Related Services »" and "Browse Sub-Categories »".
- DTS Services:** Contains links to the DTS Service Catalog and Customer System (CSS). Includes a link to "List Related Services »".


- There are multiple ways to initiate a request.
 - Service Category links
 - Searching for a Service
 - Quick Picks in the Navigation Pane





Service Category Links


- Clicking on one of the Service Categories link will bring up a list of services under that link.


Service Categories


**Network Support Services**
Provides non-billable network service requests (formerly Rapid Change)
[List Related Services »](#)


**Employee Services**
Describes services that provide for building maintenance planning, phones and accessories, and voice mail.
[List Related Services »](#) [Browse Sub-Categories »](#)


**IT Support Services**
Includes services such as troubleshooting technical issues, system/application/server user id and account issues, and password resets (non-network related).
[List Related Services »](#) [Browse Sub-Categories »](#)


**DTS Services**
Contains links to the DTS Service Catalog and Customer System (CSS)
[List Related Services »](#)

**Recycle Mainframe Equipment**
Recycle terminals, printers, and controllers

**Request Information**
Request information regarding DTS services, applications, existing service requests, chain of custody, or any other general question

**User ID Request**
Request assistance with accounts, user ids, or logons for systems, applications, and servers. Please refer to services for Network related access such as RLD, VPN, SNA, CICS, VTAM, Network Mgmt Access, under Network Support Services and for Active Directory services under IT Support Services.

**Password Reset**
Request password assistance with accounts, user ids, or logons for systems, applications, and servers. Please refer to services for Network related passwords such as RLD, VPN, SNA, CICS, VTAM, Network Mgmt Access under Network Support Services and for Active Directory services under IT Support Services.

**Report an Incident**
Report an outage with an existing service

Add to Favorites

Add to Cart

Request Now

Add to Favorites

Add to Cart

Request Now

Add to Favorites

Add to Cart

Request Now

Add to Favorites

Add to Cart

Request Now








Add to Favorites

Add to Cart

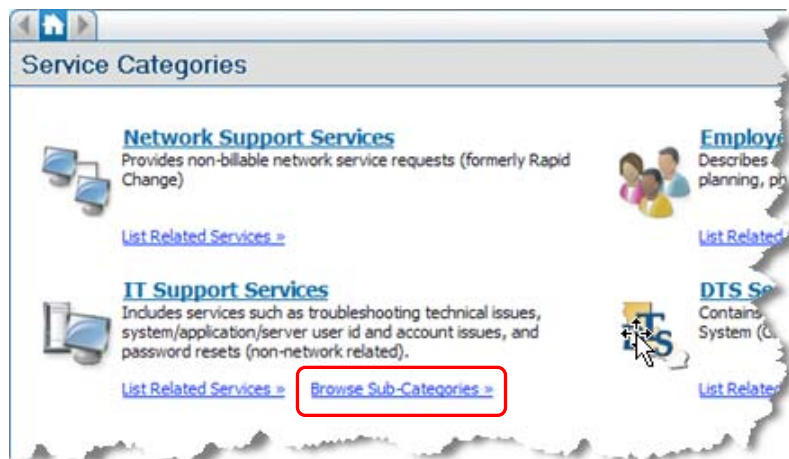
Request Now

Page 11

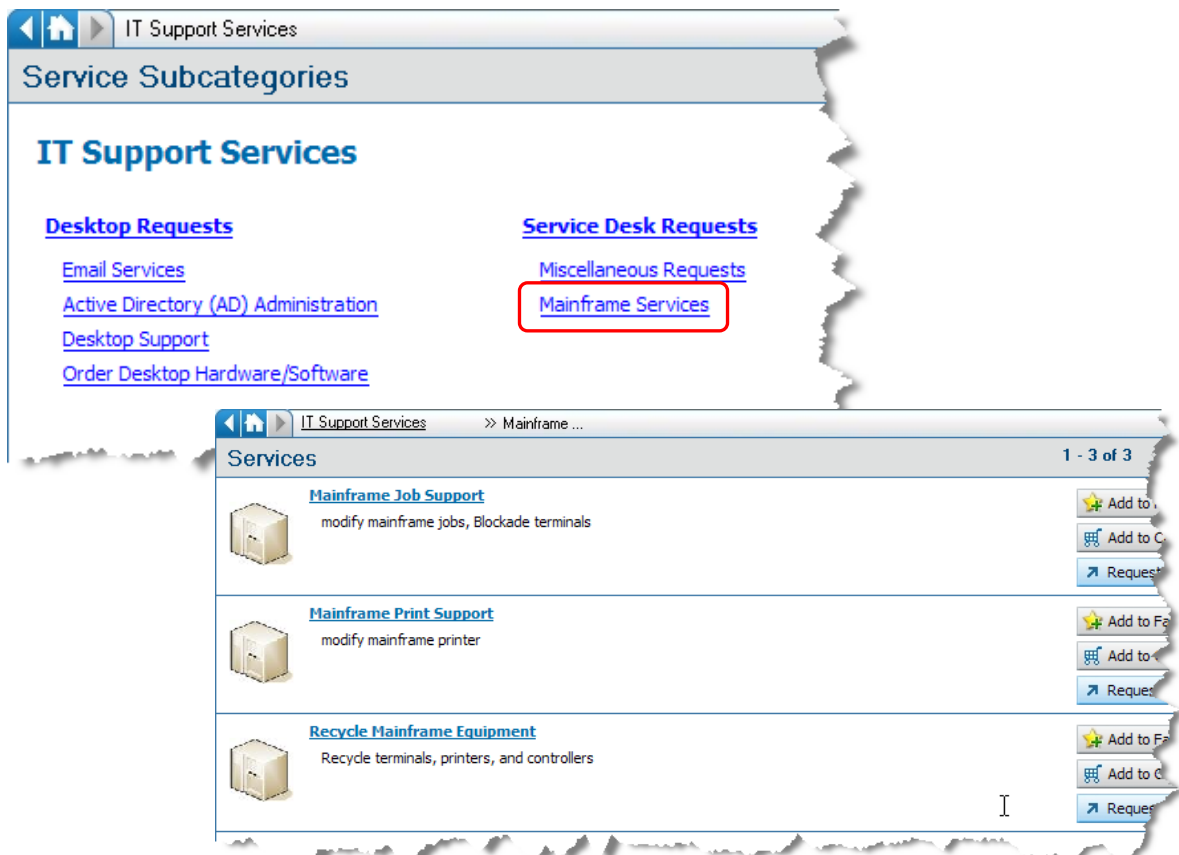
- The Services List will display information about the service and three options to select from.
 - Add a service to your Favorites List that you use most often.
 - Add a service to your Cart so services can be grouped together and submitted all at one time.
 - Request the service now.

	<u>Recycle Mainframe Equipment</u> Recycle terminals, printers, and controllers	★ Add to Favorites 🛒 Add to Cart ➔ Request Now
	<u>Request Information</u> Request information regarding DTS services, applications, existing service requests, chain of custody, or any other general question	★ Add to Favorites 🛒 Add to Cart ➔ Request Now
	<u>User ID Request</u> Request assistance with accounts, user ids, or logons for systems, applications, and servers. Please refer to services for Network related access such as RLD, VPN, SNA, CICS, VTAM, Network Mgmt Access, under Network Support Services and for Active Directory services under IT Support Services.	★ Add to Favorites 🛒 Add to Cart ➔ Request Now
	<u>Password Reset</u>  Request password assistance with accounts, user ids, or logons for systems, applications, and servers. Please refer to services for Network related passwords such as RLD, VPN, SNA, CICS, VTAM, Network Mgmt Access under Network Support Services and for Active Directory services under IT Support Services.	★ Add to Favorites 🛒 Add to Cart ➔ Request Now
	<u>Report an Incident</u>  Report an outage with an existing service	★ Add to Favorites 🛒 Add to Cart ➔ Request Now

- The Browse Sub-Categories link will bring up a list of specific Service Sub-categories to select from.

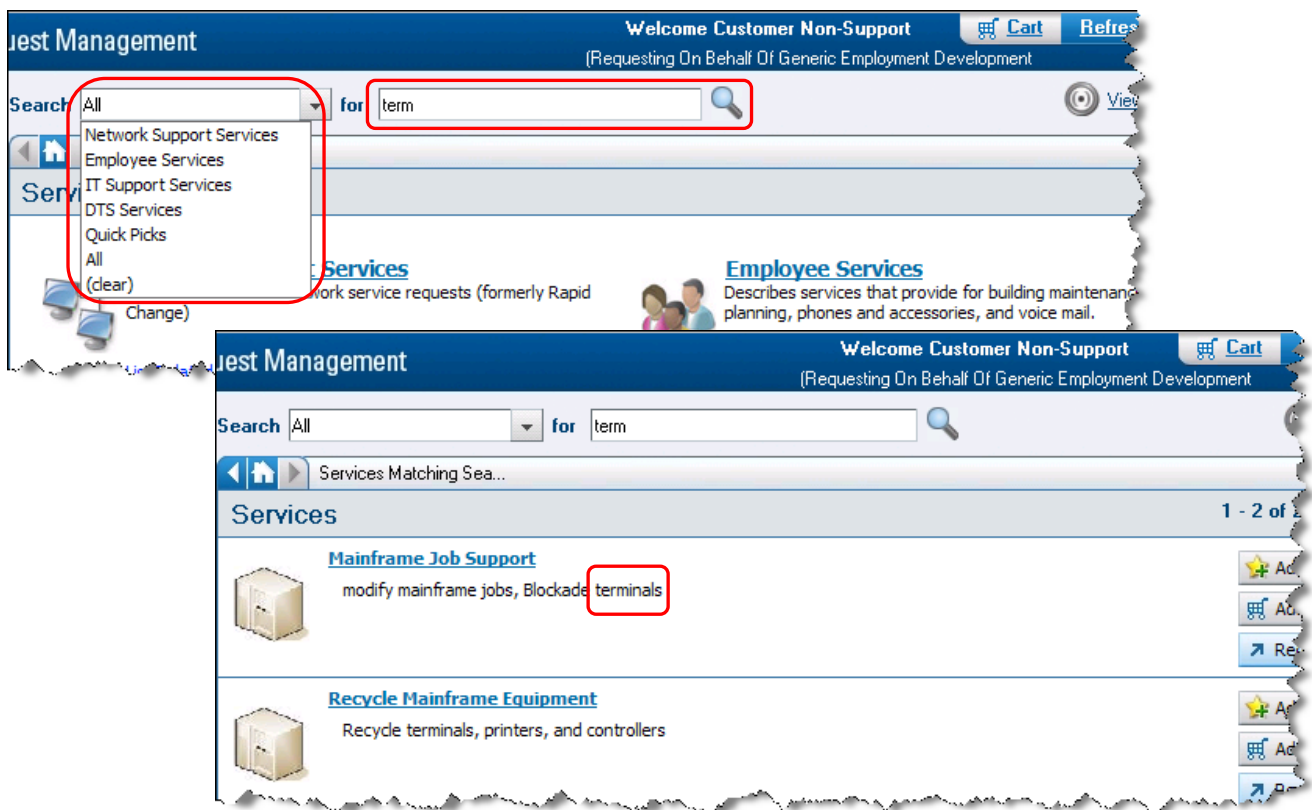


- Selecting a Service Sub-categories link will bring up a specific Services List.



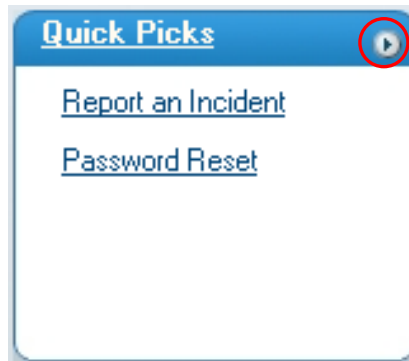
Searching for a Service

- Search for a service by entering a title, description, using keywords, or a partial word in the search field and clicking on the magnifying glass. A search will be performed for any results that are similar to what was entered. You can also search by a specific category by selecting from the search dropdown.
- An example of this would be entering the word 'term' in the search field and clicking on the magnifying glass. A search is performed and similar matches are displayed for you to select from.



Quick Picks in the Navigation Pane

- Quick Picks are requests that are selected most often and placed in the Navigation Pane eliminating having to search for the specific service. Clicking these links will select a request form that is partially pre-populated with the appropriate fields.



- Clicking on the arrow  in the Quick Picks section will display the Services List showing the quick picks with a description of each link.



Populating fields in a Request

- After selecting a Service Category, you will notice that the individual selected for the “Request On Behalf Of” is now the Requester. Depending on which service was selected, various fields will be pre-populated as well as different fields appearing on the form. All fields must be filled out to ensure that your request is addressed in a timely manner.
- Enter the name of the individual needing the request in the Contact’s fields.

Search for

Services Matching Sea... >> Provide Information

Provide Information

Requester [Edit](#)
Name Generic Employment Development Dept
Phone ###
Email stacy.fong@dts.ca.gov

Instructions
Please describe your request in the fields provided. You may attach files using the [Add Attachment] button below or after initial submission by using the [Add] button on the Activity Log portion of the console.

Request Details
Request Name
Required Date
Extended Price

Questions
Information request type*
Description of the request (add attachment if necessary)*
Contact's First Name
Contact's Last Name
Contact's Phone Number
Contact's Email Address

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- Some of the fields will have a dropdown arrow to the right of the field. Moving your cursor over these dropdown arrows will display a menu allowing you to select the appropriate item. You are required make a selection from the dropdown menu.
- The Date Required field will have a calendar icon to the right of the field which will allow you to select a date and time.

Adding an Attachment

- Add an attachment by clicking on the **Add Attachment** button located at the lower left corner of the form. A popup box will appear, click **Add**, then **Browse**, select the file to add, and then click **OK**. The message Adding attachment(s)... will appear in the status window. When the download is complete, click **Save**.

Questions

Information request type* Services

Description of the request (add attachment if necessary)* What type of backup services do you need? What is the cost associated. Do you also provide other services?

Contact's First Name Joe

Contact's Last Name User

Contact's Phone Number

Contact's Email Address

1 Add Attachment

Attachments

File Name	Max Size	Attach Label
		Attachment

2 Add

Attachment **3** Browse...

Save Close Status

4 Attachment C:\Documents and Settings\opsi30\Documents\Browse...

Status

5 OK Cancel

6 Status Adding attachment(s)...

Attachments

File Name	Max Size	Attach Label
Needs Attention.doc	666 KB	Attachment

7 Save Close

Request Submission

- Located on the bottom of the form are five Request Process buttons.
 - Add Attachment – see previous page.
 - Summary – displays a summary of the request where you can submit the request or save as a draft.
 - Add to Cart – group requests together so you can submit them all at one time. This will also allow you to view all requests or just the requests for that cart.
 - Save as Draft – save the request as a draft to be submitted at a later date.
 - Submit – submits your request.

Services Matching Sea... >> Provide Information

Provide Information

Requester [Edit](#)
Name Generic Employment Development Dept
Phone ###
Email stacy.fong@dts.ca.gov

Instructions
Please describe your request in the fields provided. You may attach files using the [Add Attachment] button below or after initial submission by using the [Add] button on the Activity Log portion of the console.

Request Details

Request Name Request Information on Services by Joe User

Required Date 02/17/2009 11:00:00 AM

Extended Price 0.00 USD

Questions

Information request type*

Services

Description of the request (add attachment if necessary)*

What type of backup services do you provide and the cost associated. Do you also provide storage services.

Contact's First Name

Joe

Contact's Last Name

User

Contact's Phone Number

(234)456-0812

Contact's Email Address

Joe.user@dts.ca.gov

Add Attachment

Summary

Add To Cart

Save As Draft

Submit

- After submitting the request and selecting Request Details, you will notice that **Requested By** is you, **Requested For** is the Generic profile for your agency, and the **Contact** information is the individual requesting the request.

DetailsActivity LogProcess View

Request Status: Planning

Summary for Report an IncidentPrint

ID:REQ000000003287

Title:Report an Incident

Level:

Turnaround Time: 0 Hours

Submit Date:2/4/2009 11:54:05 AM

Requested By:Customer Non-Support

Requested For:Generic Employment Development Dept

Company:DTS ITSM Services

Phone:(900) 234-0975

Email:Generic@edd.ca.gov

Provided Information

Incident type :Disruption in service

Incident category :Degradation

Description of the Incident (add attachment if necessary) :Client is unable to access the Internet.

Impact :1-Extensive/Widespread

Urgency :2-High

Contact's First Name :Joe

Contact's Last Name :User

Contact's Phone Number :(900)234-1256

Contact's Email Address :Joe.User@edd.ca.gov

Close

Viewing a request

- If you still display the “Request On Behalf Of” message at the upper right corner of the form, you are viewing all requests in your agency or department. You can locate your requests from the selections in the table.
- If you want to only see your requests, click the “On Behalf Of Self” link. It will now display “Requests On Behalf Of” and you are viewing your own requests.

BMC Service Request Management

Welcome Customer Non-Support
(Requesting On Behalf Of Generic Employment Development)

Search All for

Submitted Requests

Needs Attention 0
Drafts 0
Since Last Visit 12
Open Requests 0

Quick Picks

[Report an Incident](#)
[Password Reset](#)

Action Menu

[Service Categories](#)
[User Preferences](#)
[Answer Surveys](#)
[Suggestion](#)
[On Behalf Of Self](#)

Submitted Requests

Show All Open Requests Service Cart

2 entries returned - 2 entries matched

Request ID	Request Name	Status	Status Reason	Submit Date
REQ000000003384	Report an Incident	Planning		2/17/2009 12:11:33 PM
REQ000000003256	Request Information	Planning		2/3/2009 2:12:52 PM

Request Summary

Activity Log :

BMC Service Request Management

Welcome Customer Non-Support

Search All for

Submitted Requests

Show Requests Needing Attention Service Cart

4 entries returned - 4 entries matched

Request ID	Request Name	Status	Status Reason
REQ000000002805	Request Information	Completed	Successful
REQ000000002749	submission from client tool	Canceled	By Provider
REQ000000002748	Report an Incident	Canceled	By Provider
REQ000000002324	REOPEN: User ID Request (REQ000000000...	Completed	With Issues

Request Summary

Request Status : Complete

Request Description : Request information regarding DTS services, applications, existing service requests, chain of custody, or any other general question

Activity Log :
12/31/2008 8:12:50 AM ; test public test
1/22/2009 9:42:10 AM ; C

- If you are already in the Submitted Requests console, you can also view the requests through the Submitted Requests Navigation Pane or by clicking on the Show field or Service Cart located at the top of the table. These dropdowns will have other additional tables you can access that the navigation pane does not.
- You will also have the same option on this console to select viewing all of your agencies requests or just your own as described in the previous page.

Submitted Requests

Needs Attention 8
Drafts 2
Since Last Visit 0
Open Requests 10

Quick Picks

[Report an Incident](#)
[Password Reset](#)

Action Menu

[Service Categories](#)
[User Preferences](#)
[Answer Surveys](#)
[Suggestion](#)
[On Behalf Of Self](#)

Submitted Requests

Show: All Open Requests
All Open Requests
Draft Requests
Requests Needing Attention
Recently Closed Requests
Requests Closed Since Last Login
Closed Requests
(clear)

Service Cart

CR00000000000041
my stuff
Test cart
(clear)

Request ID	Request Name	Submit Date	
REQ00000000000000000000	Report an Incident	6/14/2008 1:04 PM	
REQ0000000000001666	Report an Incident	6/12/2008 6:33 PM	
REQ0000000000001527	Mainframe Print Support	6/6/2008 6:10:59 PM	6/6/2008
REQ0000000000001525	Mainframe Job Support	6/6/2008 5:31:47 PM	6/6/2008
REQ0000000000001524	Recycle Mainframe Equipment	6/6/2008 5:25:58 PM	6/6/2008
REQ0000000000001522	User ID Request	6/6/2008 5:22:29 PM	6/6/2008
REQ0000000000001521	Request Information	6/6/2008 5:21:19 PM	6/16/2008
REQ0000000000001520	Password Reset	6/6/2008 5:19:05 PM	6/6/2008
REQ0000000000001518	Report an Incident	6/6/2008 5:16:48 PM	6/6/2008
REQ0000000000001516	REOPEN: Report an Incident (REQ0000000000001516)	6/6/2008 5:13:58 PM	6/6/2008

Request Summary

Request Status : In Progress

Request Description : Report an outage with an existing service

Activity Log :

6/15/2008 9:46:05 AM : opsi30
Placed call to CMAC to perform after hours intrusive testing

6/15/2008 9:50:49 AM : opsi30
Barbara (CMAC) states that there is a major fiber cut in

[Add](#) [Activity Log Details](#)

[Request Details](#) [Complete Request](#) [Cancel](#) [Reopen](#)

Service Request - Navigation Pane

- There are four selections to choose from:
 - Needs Attention – displays requests that require your attention.
 - Drafts – displays requests that have been saved as a Draft to be submitted at a later date.
 - Since Last Visit – displays requests that have been Closed since your last visit.
 - Open Request – displays all Open requests.

Service Requests – Show Field

- Settings in this dropdown are configurable through the User Preferences link.
- There are six selections to choose from:
 - All Open Requests – displays All Open requests.
 - Draft Requests – displays requests that have been saved as a Draft to be submitted at a later date.
 - Requests Needing Attention – displays requests that require your attention.
 - Recently Closed Requests – shows Recently Closed request.
 - Requests Closed Since Last Login – displays requests that have been Closed since your last visit.
 - Closed Requests – shows all of your Closed requests.

Service Cart

- Selections in this dropdown are grouped together if you submitted your requests using the Service Cart. Only requests that are in the particular cart are displayed when selected. You can enter a unique name for the cart to make it easily identifiable from other carts and requests.

Submitted Requests Console

- There are four sections to a Submitted Request Console.
 - 1). Request Table
 - 2). Request Status and Description
 - 3). Activity Log
 - 4). Request Process Buttons

The screenshot displays the Submitted Requests Console interface. A red box labeled '1' highlights the Request Table at the top. A red box labeled '2' highlights the Request Status and Description section. A red box labeled '3' highlights the Activity Log section. A red box labeled '4' highlights the Request Process Buttons at the bottom.

Submitted Requests

Show Requests Needing Attention Service Cart

10 entries returned - 10 entries matched

Request ID	Request Name	Status	Submit Date	Expected Date
REQ000000001666	Report an Incident	In Progress	6/12/2008 6:33:33 PM	6/12/2008
REQ000000001527	Mainframe Print Support	Planning	6/6/2008 6:10:59 PM	6/6/2008
REQ000000001525	Mainframe Job Support	Draft	6/6/2008 5:31:47 PM	6/6/2008
REQ000000001524	Recycle Mainframe Equipment	Planning	6/6/2008 5:25:58 PM	6/6/2008
REQ000000001522	User ID Request	Pending (Need More Inform...	6/6/2008 5:22:28 PM	6/6/2008
REQ000000001521	Request Information	Planning	6/6/2008 5:21:19 PM	6/16/2008
REQ000000001520	Password Reset	Pending (Need More Inform...	6/6/2008 5:19:05 PM	6/6/2008
REQ000000001518	Report an Incident	In Progress	6/6/2008 5:16:48 PM	6/6/2008
REQ000000001516	REOPEN: Report an Incident (REQ000000001...	Planning	6/6/2008 5:13:58 PM	6/6/2008

Request Summary

Request Status : In Progress

Request Description : Report an outage with an existing service

Activity Log :


6/15/2008 9:46:05 AM : opsi30
Placed call to CMAC to perform after hours intrusive testing

6/15/2008 9:50:49 AM : opsi30
Barbara (CMAC) states that there is a major fiber cut in

Add Activity Log Details

Request Details Complete Request Cancel Reopen

Request Table

- This table will display a list of requests depending on the search criteria you select from the Service Requests Navigation Pane, Show field, or Service Cart. The table will display the Request ID, Request Name, Status, Status Reason, Submit Date, and Expected Date. The table will also display how many requests were found and an alarm symbol  if you have requests that need your attention.

10 entries returned - 10 entries matched

Request ID	Request Name	Status	Submit Date	Expected Date
REQ000000001666	Report an Incident	In Progress	6/12/2008 6:33:33 PM	6/12/2008
REQ000000001527	Mainframe Print Support	Planning	6/6/2008 6:10:59 PM	6/6/2008
REQ000000001525	Mainframe Job Support	Draft	6/6/2008 5:31:47 PM	6/6/2008
REQ000000001524	Recycle Mainframe Equipment	Planning	6/6/2008 5:25:58 PM	6/6/2008
REQ000000001522	User ID Request	Pending (Need More Inform...	6/6/2008 5:22:28 PM	6/6/2008
REQ000000001521	Request Information	Planning	6/6/2008 5:21:19 PM	6/16/2008
REQ000000001520	Password Reset	Pending (Need More Inform...	6/6/2008 5:19:05 PM	6/6/2008
REQ000000001518	Report an Incident	In Progress	6/6/2008 5:16:48 PM	6/6/2008
REQ000000001516	REOPEN: Report an Incident (REQ000000001...	Planning	6/6/2008 5:13:58 PM	6/6/2008

- There are multiple ways of viewing a request. You can highlight any request in the table. This will populate information about the request in the Request Summary area located below the table.

Submitted Requests

Submitted Requests Show All Open Requests

10 entries returned - 10 entries matched

Request ID	Request Name	Status	Submit Date	Expected Date
REQ000000001666	Report an Incident	In Progress	6/12/2008 6:33:33 PM	6/12/2008
REQ000000001527	Mainframe Print Support	Planning	6/6/2008 6:10:59 PM	6/6/2008
REQ000000001525	Mainframe Job Support	Draft	6/6/2008 5:31:47 PM	6/6/2008
REQ000000001524	Recycle Mainframe Equipment	Planning	6/6/2008 5:25:58 PM	6/6/2008
REQ000000001522	User ID Request	Pending (Need More Inform...	6/6/2008 5:22:28 PM	6/6/2008
REQ000000001521	Request Information	Planning	6/6/2008 5:21:19 PM	6/16/2008
REQ000000001520	Password Reset	Pending (Need More Inform...	6/6/2008 5:19:05 PM	6/6/2008
REQ000000001518	Report an Incident	In Progress	6/6/2008 5:16:48 PM	6/6/2008
REQ000000001516	REOPEN: Report an Incident (REQ000000001...	Planning	6/6/2008 5:13:58 PM	6/6/2008

Request Summary

Request Status : In Progress

Request Description : Report an outage with an existing service

Activity Log :

6/15/2008 9:46:05 AM ; opsi30
Placed call to CMAC to perform after hours intrusive testing

6/15/2008 9:50:49 AM ; opsi30
Barbara (CMAC) states that there is a major fiber cut in

Add Activity Log Details

Request Details Complete Request Cancel Reopen

- You can also highlight a request and click on the Request Details button or Double click on the request and this will bring up the Request Details view.

Request Table - Request Status and Description

- This will display the current status and description of the selected request.

Request Status :

In Progress



Request Description :
Report an outage with an existing service

Request Table - Activity Log

- The Activity Log displays entries made by yourself and by DTS Staff. It will show the date and time stamp, the DTS technician that made the entry, and information on what was done.

Activity Log :

6/15/2008 9:46:05 AM ; opsi30

Placed call to CMAC to perform after hours intrusive testing

6/15/2008 9:50:49 AM ; opsi30

Barbara (CMAC) states that there is a major fiber cut in

Add

Activity Log Details

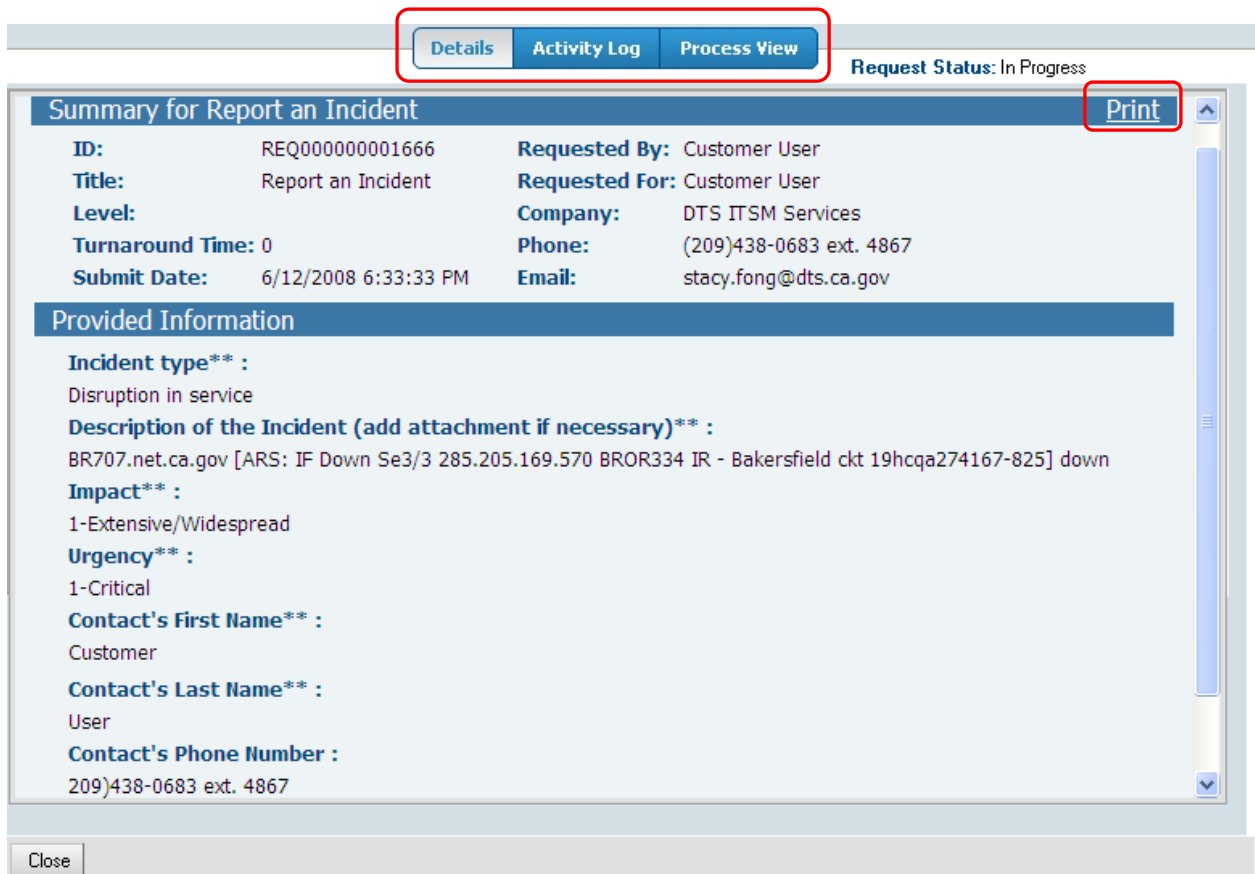
Request Process Buttons

- These buttons will perform certain functions and will either be enabled (visible) or disabled (grayed out) depending on the table you are viewing or status of the Service Request.



Request Details – Details Tab

- Selecting this view will display the Details of the request, the Activity Log showing entries made by DTS staff, and the Process View which contains system information. You can print out the request by selecting the Print link. Only information in the Details tab will be printed, the Activity Log will not be included. You can select the other views by clicking on the tabs located at the top of the form.



Details Activity Log Process View Request Status: In Progress

Summary for Report an Incident [Print](#)

ID:	REQ000000001666	Requested By:	Customer User
Title:	Report an Incident	Requested For:	Customer User
Level:		Company:	DTS ITSM Services
Turnaround Time:	0	Phone:	(209)438-0683 ext. 4867
Submit Date:	6/12/2008 6:33:33 PM	Email:	stacy.fong@dts.ca.gov

Provided Information

Incident type :**
Disruption in service

Description of the Incident (add attachment if necessary) :**
BR707.net.ca.gov [ARS: IF Down Se3/3 285.205.169.570 BROR334 IR - Bakersfield ckt 19hcqa274167-825] down

Impact :**
1-Extensive/Widespread

Urgency :**
1-Critical

Contact's First Name :**
Customer

Contact's Last Name :**
User

Contact's Phone Number :
209)438-0683 ext. 4867

Close

Request Details – Activity Log

- The Activity Log is broken up into four sections.
 - 1). Summary Table
 - 2). Summary Description
 - 3). Attachment
 - 4). Submitter Information

The screenshot shows the 'Request Details - Activity Log' interface. At the top, there are tabs for 'Details', 'Activity Log', and 'Process View'. The 'Request Status' is 'In Progress'. A red circle with the number '1' points to the 'Activity Log' tab. Below the tabs, a table displays 12 entries. A red circle with the number '2' points to the 'Summary' column of the table. A red circle with the number '3' points to the 'Attachment' section, which includes a table with columns 'File Name', 'Size', and 'Attach Label'. A red circle with the number '4' points to the 'Submitter' and 'Submit Date' fields. The interface also includes a 'Notes' section with a text area and an 'Add' button, and a 'Close' button at the bottom.

12 entries returned - 12 entries matched

Summary	Files	Submit Date	Submitter	Needs Attention
This ticket was created from the service request system.	0	6/12/2008 6:35:40 PM	Remedy Application S...	
Work in Progree	0	6/15/2008 9:28:38 AM	opsi30	Needs Attention
Work in Progress	0	6/15/2008 9:28:55 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:08 AM	opsi30	Needs Attention
Calling client	0	6/15/2008 9:36:21 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:23 AM	opsi30	Needs Attention
Client Update	0	6/15/2008 9:42:40 AM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	0	6/15/2008 9:46:05 AM	opsi30	Needs Attention
CMAC update	0	6/15/2008 9:50:49 AM	opsi30	Needs Attention
Need an update	0	6/15/2008 12:12:20 ...	Customer User	
This ticket was created from the service request system.	1	6/16/2008 3:31:46 PM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	1	6/16/2008 3:32:29 PM	opsi30	Needs Attention

Summary : CMAC update

Notes : Barbara (CMAC) states that there is a major fiber cut in Bakersfield and technicians are currently working on repairing the cut. No ETR at this time.

Attachment :

File Name	Size	Attach Label
		Attachment 1

Add

(Limit 1 Attachment per Activity Log Entry)

Submitter : opsi30

Submit Date : 6/15/2008 9:50:49 AM

Add

Close

Request Details – Activity Log – Summary Table

- The Summary table displays the Summary, Attached Files, Submit Date, Submitter, and Needs Attention columns. If the entry displays a Needs Attention message, this is a flag informing you that a new entry has been entered into the Activity Log by DTS staff. Once you view or take action on that entry, the alarm symbol 🚨 and Needs Attention message will disappear.

12 entries returned - 12 entries matched

Summary	Files	Submit Date	Submitter	Needs Attention
This ticket was created from the service request system.	0	6/12/2008 6:35:40 PM	Remedy Application S...	
Work in Progree	0	6/15/2008 9:28:38 AM	opsi30	Needs Attention
Work in Progress	0	6/15/2008 9:28:55 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:08 AM	opsi30	Needs Attention
Calling client	0	6/15/2008 9:36:21 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:23 AM	opsi30	Needs Attention
Client Update	0	6/15/2008 9:42:40 AM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	0	6/15/2008 9:46:05 AM	opsi30	Needs Attention
CMAC update	0	6/15/2008 9:50:49 AM	opsi30	Needs Attention
Need an update	0	6/15/2008 12:12:20 ...	Customer User	
This ticket was created from the service request system.	1	6/16/2008 3:31:46 PM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	1	6/16/2008 3:32:29 PM	opsi30	Needs Attention

Request Details – Activity Log – Summary Description

- Clicking on an entry in the Summary Table will display the Summary and any Notes entered for that entry, Attachments, and the Submitter and Submit Date information.

Summary :	CMAC update	Attachment :	<table><tr><th>File Name</th><th>Size</th><th>Attach Label</th></tr><tr><td></td><td></td><td>Attachment 1</td></tr><tr><td colspan="3"><input type="button" value="Add"/></td></tr><tr><td colspan="3">(Limit 1 Attachment per Activity Log Entry)</td></tr></table>	File Name	Size	Attach Label			Attachment 1	<input type="button" value="Add"/>			(Limit 1 Attachment per Activity Log Entry)		
File Name	Size	Attach Label													
		Attachment 1													
<input type="button" value="Add"/>															
(Limit 1 Attachment per Activity Log Entry)															
Notes :	Barbara (CMAC) states that there is a major fiber cut in Bakersfield and technicians are currently working on repairing the cut. No ETR at this time.	Submitter :	opsi30												
		Submit Date :	6/15/2008 9:50:49 AM												

Updating a request

- There are two ways to update a request.
 - The Submitted Requests Console Activity Log. Highlight the request to be updated.
 - The Request Details Console Activity Log Tab. Highlight the request to be updated and double click or click on the Request Details button.

Submitted Requests Console – Activity Log

- To make an entry in the Activity Log, click the Add Button from the Submitted Request Console, make an entry in the Summary and Notes fields, and click Save. If you need to add an attachment, follow the previous instructions on Adding an Attachment.

The screenshot displays the 'Submitted Requests Console – Activity Log' interface. At the top, a table lists 12 entries, with the 5th entry, 'Report an Incident' (REQ000000001523), highlighted in yellow. Below the table, the 'Request Summary' section shows the 'Request Status' as 'In Progress' and the 'Request Description' as 'Report an outage with an existing service'. To the right, the 'Activity Log' shows two entries: '6/6/2008 7:01:59 PM : opsi30' with the note 'Contacting client', and '6/6/2008 7:02:32 PM : opsi30' with the note 'researching problem'. An 'Add' button is highlighted in red next to the second entry. Below the Activity Log, the 'Request Details' form is visible. The 'Summary' field contains 'Secondary Contact', and the 'Notes' field contains 'If I am unavailable, please contact Customer User 2 at (209) 345-2365 Ext. 4567'. The 'Attachment' section shows a table with one attachment, 'Attachment1', and an 'Add' button is highlighted in red. The 'Submitter' is 'Customer User' and the 'Submit Date' is '6/14/2008 8:41:58 PM'. At the bottom, 'Save' and 'Close' buttons are highlighted in red.

Request ID	Request Name	Status	Submit Date	Expected Date
REQ000000001527	Mainframe Print Support	Planning	6/6/2008 6:10:59 PM	6/6/2008
REQ000000001526	Report an Incident	Planning	6/6/2008 6:08:10 PM	6/6/2008
REQ000000001525	Mainframe Job Support	Draft	6/6/2008 5:31:47 PM	6/6/2008
REQ000000001524	Recycle Mainframe Equipment	Planning	6/6/2008 5:25:58 PM	6/6/2008
REQ000000001523	Report an Incident	In Progress	6/6/2008 5:23:18 PM	6/6/2008
REQ000000001522	User ID Request	Pending (Need More Information)	6/6/2008 5:22:28 PM	6/6/2008
REQ000000001521	Request Information	Planning	6/6/2008 5:21:19 PM	6/16/2008
REQ000000001520	Password Reset	Pending (Need More Information)	6/6/2008 5:19:05 PM	6/6/2008
REQ000000001518	Report an Incident	In Progress	6/6/2008 5:16:48 PM	6/6/2008
REQ000000001516	REOPEN: Report an Incident (REQ000000001516)	Planning	6/6/2008 5:13:58 PM	6/6/2008

Request Summary

Request Status : In Progress

Request Description : Report an outage with an existing service

Activity Log :

- 6/6/2008 7:01:59 PM : opsi30
Contacting client
- 6/6/2008 7:02:32 PM : opsi30
researching problem

Add Activity Log Details

Summary
Secondary Contact

Notes
If I am unavailable, please contact Customer User 2 at (209) 345-2365 Ext. 4567

Attachment
(Limit 1 attachment per Activity Log)

File Name	Size	Attach Label
		Attachment1

Add

Submitter
Customer User

Submit Date
6/14/2008 8:41:58 PM

Save **Close**

Request Details Console – Activity Log Tab

- Clicking on the Add button in the Activity Log from within the Request Details console will also allow you to make an entry in the Activity Log and add an Attachment. The Summary and Notes fields will be blank allowing you to make an entry. Click Save.

The screenshot displays the 'Request Details Console' with the 'Activity Log' tab selected. The top navigation bar includes 'Details', 'Activity Log', and 'Process View'. The main area shows a table of 12 activity entries. The 'Add' button in the bottom left corner is highlighted with a red box. Below the table, there is a form to add a new entry, which is also highlighted with a red box. The form includes fields for 'Summary', 'Notes', 'Attachment', 'File Name', 'Submitter', and 'Submit Date'. The 'Add' button is located at the bottom right of the form.

Summary	Files	Submit Date	Sub
This ticket was created from the service request system.	0	6/12/2008 6:35:40 PM	Remed
Work in Progress	0	6/15/2008 9:28:38 AM	opsi30
Work in Progress	0	6/15/2008 9:28:55 AM	opsi30
Moved to Pending Client	0	6/15/2008 9:36:08 AM	opsi30
Calling client	0	6/15/2008 9:36:21 AM	opsi30
Moved to Pending Client	0	6/15/2008 9:36:23 AM	opsi30
Client Update	0	6/15/2008 9:42:40 AM	opsi30
CMAC ticket# - CMS345964AF	0	6/15/2008 9:46:05 AM	opsi30
CMAC update	0	6/15/2008 9:50:49 AM	opsi30
Need an update	0	6/15/2008 12:12:20 ...	Cust
This ticket was created from the service request system.	1	6/16/2008 3:31:46 PM	opsi30
CMAC ticket# - CMS345964AF	1	6/16/2008 3:32:29 PM	opsi30

Summary : CMAC update

Notes : Barbara (CMAC) states that there is a major fiber cut in Bakersfield and technicians are currently working on repairing the cut. No ETR at this time.

Attachment : File Name

Add

Summary : Need an update

Notes : Please call me when you have an update on when the fiber cut will be repaired

Attachment : File Name

Add

Submitter : Customer User

Submit Date :

Save **Cancel**

Close

- After the entry is saved, you will see your entry in the table with your name shown as the submitter.

12 entries returned - 12 entries matched

Summary	Files	Submit Date	Submitter	Needs Attention
This ticket was created from the service request system.	0	6/12/2008 6:35:40 PM	Remedy Application S...	
Work in Progree	0	6/15/2008 9:28:38 AM	opsi30	Needs Attention
Work in Progress	0	6/15/2008 9:28:55 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:08 AM	opsi30	Needs Attention
Calling client	0	6/15/2008 9:36:21 AM	opsi30	Needs Attention
Moved to Pending Client	0	6/15/2008 9:36:23 AM	opsi30	Needs Attention
Client Update	0	6/15/2008 9:42:40 AM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	0	6/15/2008 9:46:05 AM	opsi30	Needs Attention
CMAC update	0	6/15/2008 9:50:49 AM	opsi30	Needs Attention
Need an update	0	6/15/2008 12:12:20 ...	Customer User	
This ticket was created from the service request system.	1	6/16/2008 3:31:46 PM	opsi30	Needs Attention
CMAC ticket# - CMS345964AF	1	6/16/2008 3:32:29 PM	opsi30	Needs Attention

Summary :

Need an update

Notes :

Please call me when you have an update on when the fiber cut will be repaired

Attachment :

File Name	Size	Attach Label
		Attachment 1

Add

(Limit 1 Attachment per Activity Log Entry)

Submitter :

Customer User

Submit Date :

6/15/2008 12:12:20 PM

Add

Close

Logging Off

- Click the Logout link at the upper right corner of the screen to close the application. Do not click on the "X" in the upper right corner, doing so will cause a delay in your next login for a minimum of one hour.

